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RECOMMENDATIONS

A careful analysis of the Records Control Schedule prepared in the Office of the Comptroller indicates some areas where possible improvements could be made in the Records Management Program. As a result the following recommendations are submitted for your consideration:

1. THAT THE DISPOSITION INSTRUCTIONS OF THE RECORDS CONTROL SCHEDULE BE RE-EXAMINED AND CONSIDERATION GIVEN TO A REDUCTION IN THE RETENTION PERIODS.

The retention periods proposed on the records control schedule were tentatively agreed to by the Records Management Staff to hasten preparation and to permit the immediate application of the schedule. However consideration should be given to a reduction in the retention periods to bring them in closer conformity with the standards established by General Services Administration for similar type records. A list of items containing suggested retention periods is attached for your consideration.

2. THAT PROCEDURES BE ESTABLISHED FOR COLLECTING AND COMPILING STATISTICAL INFORMATION TO MEASURE THE EFFECTIVENESS OF THE OFFICE OF COMPTROLLER RECORDS DISPOSITION PROGRAM.

In addition to the many intangible benefits derived from a records management program, there are substantial accomplishments that can be measured in dollar savings. To measure such benefits procedures should be established to collect and compile the following information annually;

- a. Volume (cu.ft.) of records on hand at beginning of reporting period.
- b. Volume (cu.ft.) of records transferred to the Records Center during reporting period.
- c. Volume (cu.ft.) of records destroyed during the reporting period.
- d. Volume (cu.ft.) of records on hand at end of the reporting period.

This information must be collected annually by the Management Staff for use as an aid in measuring and reporting the effectiveness of the Agency Records Management Program. A suggested draft of the type of notice that may be issued to components within the Office of the Comptroller is attached.

3. THAT THE RECORDS CONTROL SCHEDULE BE REVIEWED ANNUALLY TO EFFECT CHANGES NECESSARY TO MAINTAIN THE CURRENT STATUS OF THE SCHEDULE.

The records of an organization reflect the function it performs and as these functions change the schedule must be revised accordingly. Records series which have been discontinued and either retired or destroyed should be dropped from the schedule. Retention periods should be reduced on certain items after experience has shown that the items were over evaluated on the initial schedule. Therefore, in order to maintain an active and current records disposition program, the records control schedule must be reviewed annually and brought up to date.

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4. THAT THE RECORDS MANAGEMENT STAFF ASSIST YOU IN INSTALLING THE AGENCY FILE SYSTEM AS A PILOT FILE IN ONE OF THE STAFFS AND, IF ACCEPTABLE, EXTEND THE SYSTEM TO COVER ALL ADMINISTRATIVE AND SUBJECT FILES THROUGHOUT THE OFFICE.

The systems of filing are varied, but for the most part records are under some subject arrangement. The Agency has adopted a subject-numeric system for maintenance of this type of file see [] "Handbook for Subject Filing" and with certain modifications, could be adapted to meet the needs of the Office of Comptroller. By installing this system throughout the Office benefits will accrue to present as well as future administrators through such standardization. It will provide a file guide usable by all personnel and lessen dependence on a few file clerks to locate papers when they are needed. All new clerical personnel awaiting clearance, in the Interim Assignment Branch of the Personnel Office are given a training course in the subject numeric system.

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5. THAT THE RECORDS AT VARIOUS LEVELS RELATING TO POLICY, PLANNING AND ORGANIZATION FUNCTIONS BE REVIEWED WITH A VIEW TO CONSOLIDATING ALL POLICY MATERIAL IN A CENTRAL FILE.

A review of the schedule reveals that this material is being maintained in various areas. In the best interests of good management and of the Office of The Comptroller it is desirable that this material be brought together and placed in one file series. This will result in a complete documentation of the history and organization of the Office of the Comptroller and relieve other areas from responsibility of maintaining their files on a permanent basis. The plan would also be in conformance with record keeping practices in other offices of the Agency.

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